



Low Carbon Economy + New Electricity Demand

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Between now and 2030, over \$20 trillion will be invested in energy infrastructure worldwide

Estimated \$1.5 trillion will be invested by the U.S. power sector alone





ARRA

- Largest government intervention since New Deal
- Cost 5.4% of GDP
 - Close to 2008 military and social program spend
- 70% to be spent by end of fiscal 2010





ARRA Objectives

- Create clean-energy jobs
- Reduce daily import of oil by 2 million barrels per day
- Reduce carbon emissions
- \$97 billion in energy related funding is 1st step





Waxman-Markey American Clean Energy and Security Act (H.R. 2454)

- United States government will invest \$190 billion in clean energy solutions in order to meet growing international competition for new energy technology
- Low carbon solutions will be necessary to meet emissions reduction of 80% by 2050, goals set forth by both the G8 agreement and the Waxman-Markey legislation.

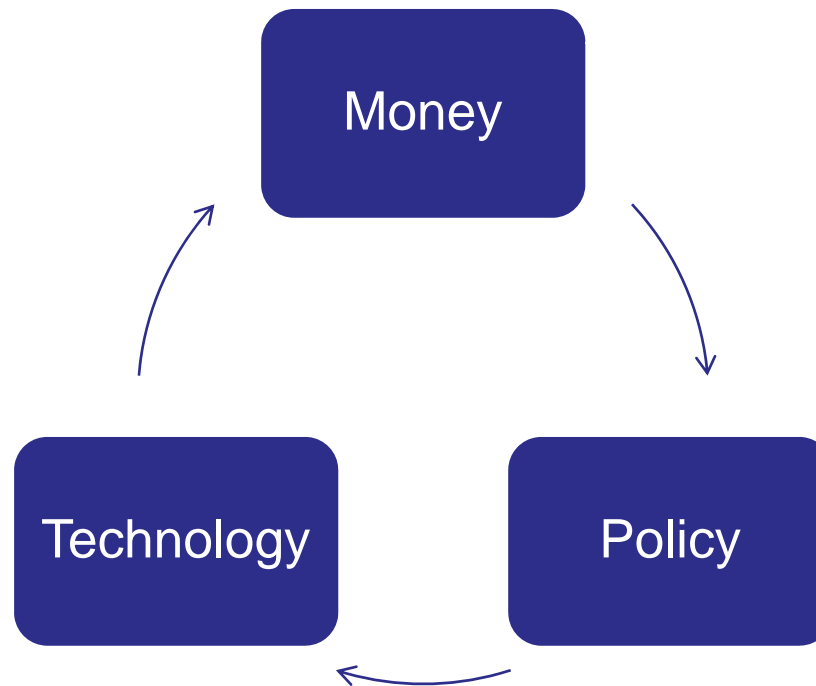


Electrified vehicles

- Electrified vehicles create NEW REVENUE for utilities
 - 20% of annual car sales in metro CA represents 2% electricity demand
- Sales of 6 to 8 million electrified vehicles per year by 2020
 - 10% of cars on road are battery electric or plug-in vehicles, running solely on electric power indicates new game
- Hawaii is building 100,000 charging stations by 2012



Integrated Solution





Tuesday

- Capital Markets
- Public Policy
- Technology Based Solutions
- Green Bank
- Disclosure - Developers & IPP Expectations
- Project Finance: Public Finance Sources



Wednesday

- Project Finance: Debt & Equity – Private
- Cleantech Certainty: Meeting Expectations
- Impact – Energy Economic Development

